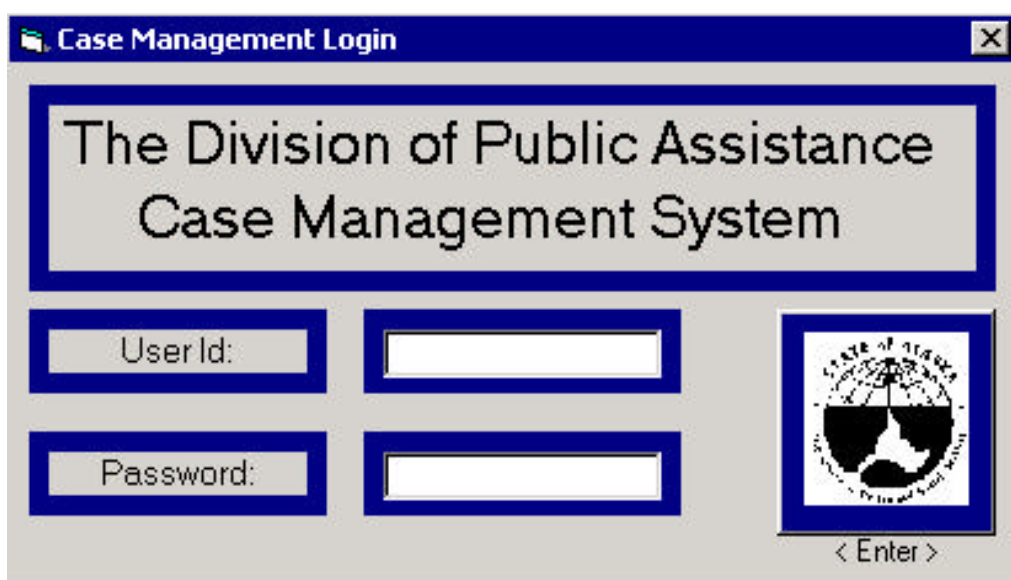


# Case Management System

## User Guide



The screenshot shows a web browser window titled "Case Management Login". Inside the window, there is a header box with the text "The Division of Public Assistance Case Management System". Below this, there are two rows of input fields. The first row has a label "User Id:" followed by a text input field. The second row has a label "Password:" followed by a text input field. To the right of these fields is the official seal of the State of Alaska, which features a moose, a ship, and a sun. Below the seal is a button labeled "< Enter >".

Systems Operations  
Division of Public Assistance  
Department of Health and Social Services  
State of Alaska

2/5/2002

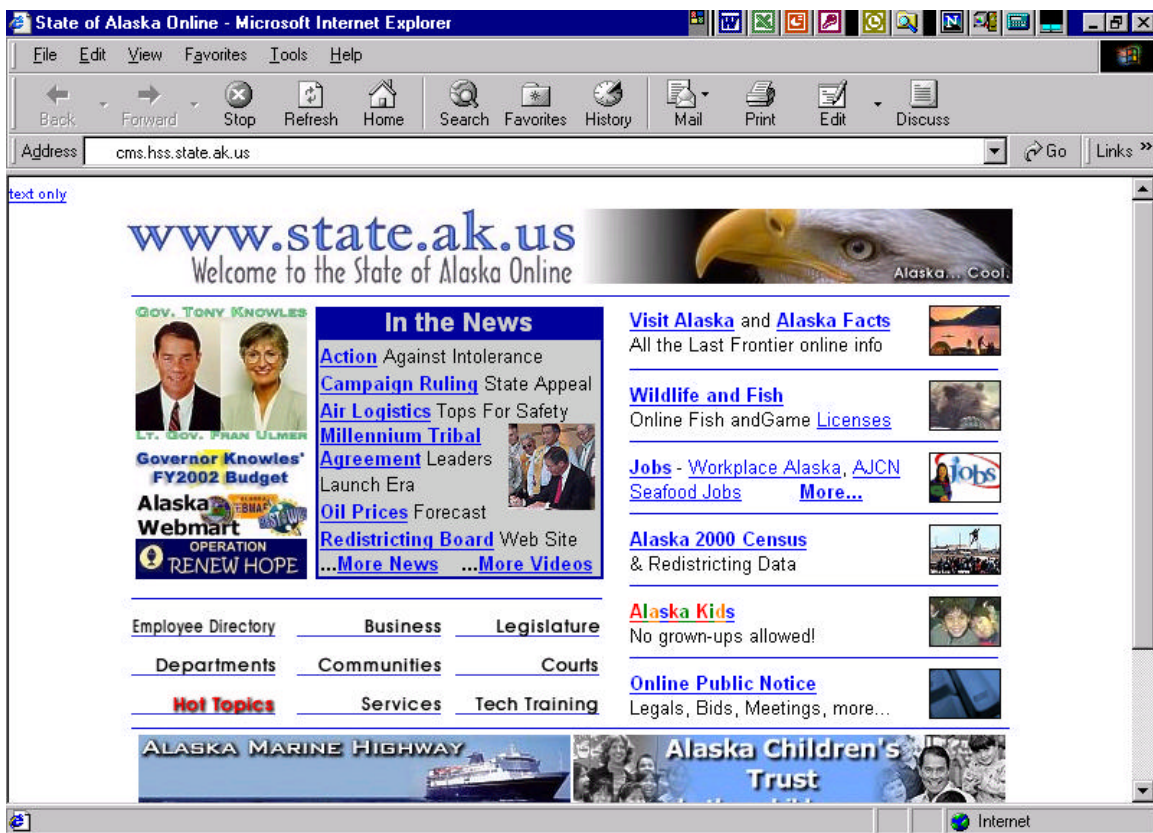
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*As you begin using the Case Management System (CMS), please contact the EIS Help Desk via e-mail at [eishelp@health.state.ak](mailto:eishelp@health.state.ak) if you have any questions or problems when working in the system.*

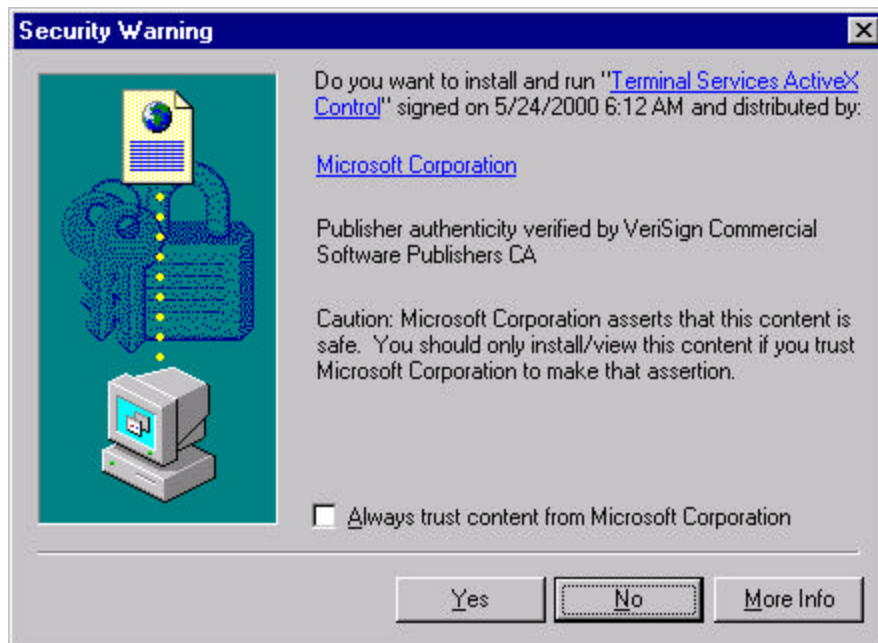
The Case Management System (CMS) must be accessed via Internet Explorer. Click on the Explorer icon on your desktop.

This will bring you to whichever home page you have set up, such as the State of Alaska home page or the Microsoft Network home page. On that home page, enter “cms.hss.state.ak.us” in the *Address* field. (If you are on the MSN Home Page, do not use the *Search the Web* field to try to access CMS.) Do **not** use “www”. Once you have accessed the CMS site, it should come up as one of your options in your drop-down list each time you access the home page. Instructions to set up a Favorite are on page 4.



If you expect to be accessing other Web sites, or if you often open web links included in e-mail messages, it is a good idea to open an additional session of Explorer to use for those purposes. Otherwise, when you click on those links, or access other Web sites, you will be disconnected from the Case Management System.

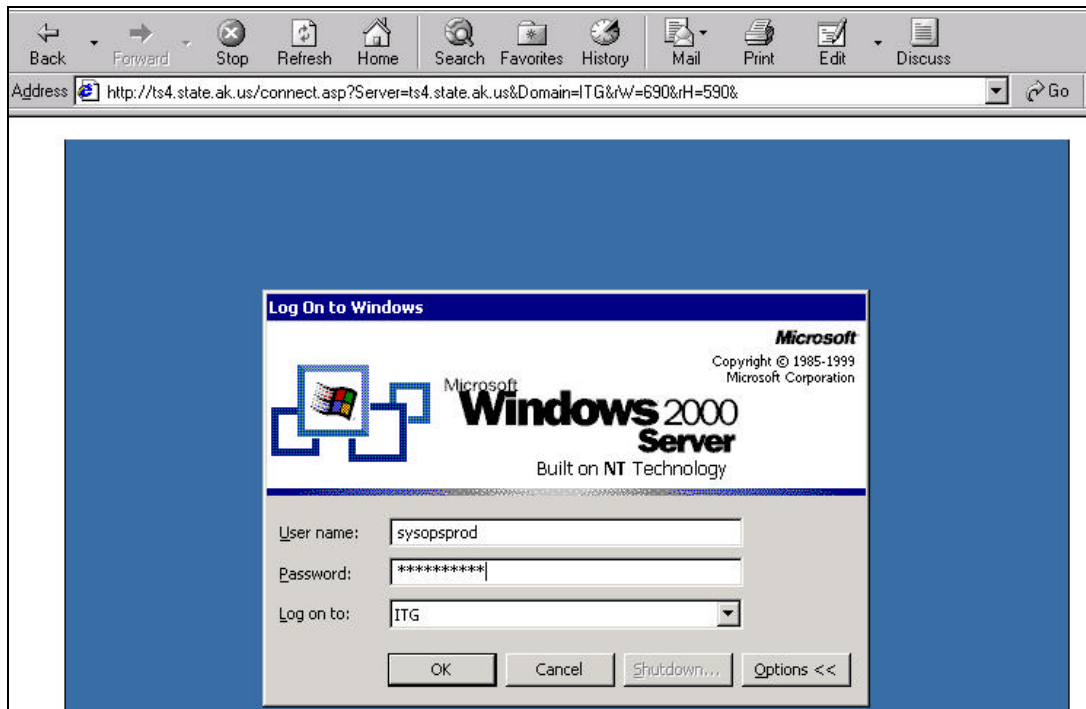
The first time you access CMS in this manner, you will get the following screen. Please click on *Yes*.



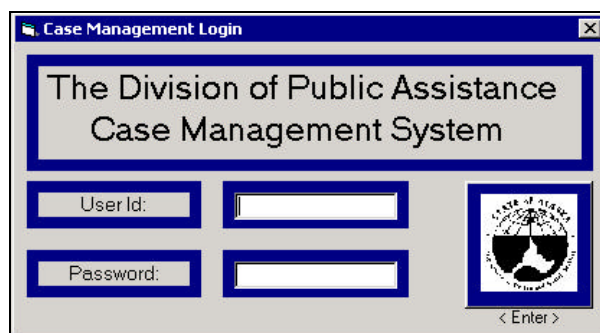


The Windows Login Screen will display. If you wish to set up Case Management as a Favorite, it should be done using the address appearing in the Address field in the example below. Click on the Favorites icon. When the menu appears, click on Add. The correct address for the Case Management System connection is added as a Favorite.

To continue the entry sequence for CMS, type in the User ID code and password. Each office will be assigned a User ID code and password for this screen. Then hit <enter> or click on *OK*.

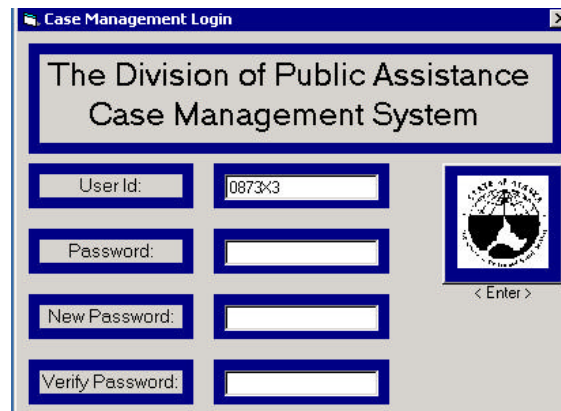


This brings you to the sign-on screen for the Case Management System. You must enter your User ID and Password in the appropriate fields. If you have access to both CMS and the Eligibility Information System (EIS), the User ID and Password is the same for both. Once those fields have been completed, you may either press <enter> or click once on the Department of Health and Social Services logo.



Once you've gained access to the CMS, the screen above displays. Any time you want to change your password, you may click on *Commands* and then select *Change Password*.

On the *Change Password* screen, make entries as you normally do in other sessions or programs to enter a new password. **Keep in mind that changing your password in EIS changes it for CMS and vice versa.**



Some general information:

**First and foremost! If you have access to both EIS and CMS, and you use multiple sessions when doing casework, it is very important that you NOT have the same client up in both EIS and CMS. This can cause SPIKES in EIS and create other problems in CMS.**

When you first access CMS, you will see that its windows appear on top of other windows, and, as a result, you can't view a full screen. To remove the other windows and to provide a full-screen view of Case Management, press the *Ctrl-Alt-Pause* keys simultaneously. To return to windows and partial screens, repeat this function. To move between sessions while staying on the full screen in CMS, use *Tab-Alt* to bring up the icons for your sessions, and then to select the session you want.

The Case Management System does have *Help* screens. By clicking the cursor/mouse on a field and pressing *F1*, you will access the Help information for that field. If a specific field does not have help, the system will take you to the next higher level of related help, which may be screen (or tab) help. For example, on the upper part of every screen is some basic client information. If you *F1* from any of these fields, you will see help for *Getting Started* in Case Management. On the Work Activities tab, pressing *F1* on most fields will also give you general screen information. However, using the *F1* Help function on fields with drop-down menus or boxes, especially if they list particular codes, will give you information specific to that field.

To see more of a Help screen, you can enlarge the viewing area by dragging its border out over the contents portion of the screen. You can also go to other help topics by clicking on those topics in the Help contents list that displays to the left of the Help information area. To exit the Help screen, just click on the X in the upper right hand corner of the screen.

The Help screens can be printed, but we recommend you do not print them. Sizing requirements in the programming make them too large to print with all the information on one page in most instances. The screens and most of the same information as in Help are available in this User's Guide.

***Remember, if you have any questions or problems when working in CMS, please contact the EIS Help Desk via e-mail at [eishelp@health.state.ak](mailto:eishelp@health.state.ak).***

Upon changing your password, you will again access the main screen of the Case Management System.

It remains blank until you enter search criteria in either the *Client Number*, *Client Name*, or *Client SSN* field. Once you've entered your search criteria, simply press <enter> or click on the H&SS logo or on the Traffic Light icon on the tool bar. *If you search by client name or by client SSN, the cursor must remain in the search field, and you must press <enter>.*

Entering a client number, client SSN or last name or partial last name of a person who has no work services involvement generates an edit, *Client not in JAS*. (Entering a **last** and **first** name of a client not in JAS will still bring up the list of any clients in JAS with that same **last** name.)

You must "inquire" or search and select a client before entering data. You will not be able to navigate any further within CMS unless you have indicated a specific client.

If you search by Client Name, you may inquire using the first letter of the client's last name up to the entire last name, and CMS will display the following screen:

**Client Search**


Commands

Client Number: 0000025967 Client Name: Smartmed, One

Page: 1

Client Number	Client Name	Date of birth	SSN
0000025967	Smartmed, One	05/05/1970	
0000025968	Smartmed, Two	06/06/1968	
0000025609	Smeltzer, Billy B.	01/01/1958	908-77-6665
0000027437	Smiff, Smoff Z.	01/01/1966	054-56-1269
0000015893	Smiff, Clyde A.	10/01/1968	930-45-7624
0000015893	Smiff, Thomas A.	10/01/1968	930-45-7624
0000015893	Smiff, Person1 A.	10/01/1968	930-45-7624
0000015895	Smiff, Person3	10/01/1977	109-34-5623
0000017836	Smith, Frank L.	01/01/1967	421-32-1321
0000015653	Smith, Greg	01/01/1961	923-48-7544
0000019967	Smith, Leoni L.	12/27/1963	574-50-1669
0000028406	Smith, Yet another	01/01/1955	
0000028484	Smithers, Judee	12/12/1972	124-34-9814
0000027841	Smitty, Jackie	10/15/1953	
XXXXXXXXXX	End of Client List	XXXXXXXXXX	XXXXXXXXXX

In this example, the search criteria of “sm” was entered in the Client Name field and CMS brought up all clients with the last name beginning with sm. The list is sorted alphabetically and includes only clients who are “known to JAS” in EIS—those who at some time have had a work services involvement. Clients who have aliases listed in EIS will appear in all appropriate lists in CMS. In this example, Leoni Smith would also appear in a search for A (Ash) and J (Johnson).

You may page forward or backward through the list by clicking on the arrow icons on the tool bar near the top of the window screen or by changing the number in the *Page* field and hitting <enter>. You may also reset to the top of the list with the  icon. By clicking on the Stop Sign icon, you may leave the list without making a selection and return to the Case Summary screen or the tab you were on when you began the search.

The Client Search screen appears with the first name highlighted. To select this client, simply <enter> or double click the name or click on the Traffic Light icon. To select any other client on this page, use the down arrow on the keyboard or the mouse/cursor to highlight the client, and then select that client by one of the three methods explained above. This will take you to the individual client’s CMS file which will allow you to view their EIS **case summary**, view or enter **work activity** hours, view their supportive services **payment history**, view or enter **case notes**, view or enter **client notes**, view or enter client **alerts**, and view or enter **FSSPs** (Family Self-Sufficiency Plans).

The following screen represents a Case Management System screen that is ready for update and/or viewing. *(Please note: if you search by Client SSN or Client Number, the system updates with the client information immediately, without going to a Client Search screen/list.)*

**Case Management System**

Commands Help

Navigation Tabs

Client Number: 0000028544 Client: [dropdown]  
 Client SSN: 832-94-8209 Date of Birth: 10/20/1950 Phone Number: (907) 333-3333

**Case Summary** Work Activities Payment History Case Notes Client Notes Alerts FSSP

**TA Program Information**

TA Case:	00007518	TA Month:	04/2001	TA Participation:	IN	Last TA Ben:	03/2001
TA Ben Amt:	\$916.00	TA Iss Amt:	\$916.00	TA HH Type:	1P	TA HH Size:	03

**EIS Program Information**

Pgm	Current Month	Part	Pgm Status	Status Date
TA	04/2001	IN	Closed	03/31/2001
FS	12/2000	IN	Closed	11/30/2000

**EIS Case Information**

Office:	041	Unit:	4	CaseLoad:	01
TA Case Assigned to: Korenek, Becktest Q.					
TA Counter:	7	BA Counter:	4		

**Address Information**

**Mailing Address:**


**Residence Address:**


X [text field] ANCHORAGE AK 99762


**Additional Information**

MSG # 333-4444, SISTER WHO LIVES NEXT DOOR

Under the Client SSN field, there are seven tabs that are used to navigate within the CMS. You must select one of the tabs for viewing and entering data. To select a tab, simply move the cursor (arrow) to the tab indicator and click once. The view of this screen will change, with your selection displayed.

Also, on the main tabs as well as on many of the entry screens accessed through these tabs, there are a number of icons on the tool bar. Depending on the function of the screen, the icons vary somewhat. However, three icons appear on nearly every screen. One of those is the , which is a means of exiting a screen or function without making a change or completing an action (similar to *PF9* for users who are familiar with EIS). If you click on the Stop Sign from one of the main tab screens, it will cause you to exit from the Case Management System.

Next is the . Use this icon if you want to print information on a screen or tab. Make sure the printer you use for Case Management is a not a dot matrix printer (preferably a laser printer).

And finally, there is the . The Traffic Light means “enter” or “refresh,” and updates or completes an action or a screen.

Below is a description of the information displayed on the Case Summary tab:



## Case Summary Tab

1. This is the Client ID Number. The drop down arrow on this field will keep a history of all client ID's accessed within the current session for easy recall.
2. This is the Client Name. The drop down arrow on this field will keep a history of all client names accessed within the current session for easy recall.
3. This is the Client Social Security Number. The drop down arrow on this field will keep a history of all client SSNs accessed within the current session for easy recall.
4. This is the client's date of birth.
5. This is the client's phone number.

*Please note: the screen above is for a Temporary Assistance case with "Jobs" work services. If the case is a Food Stamp case with E&T work services, all "Program Information" fields (6 – 13) will reference "FS" instead of "TA."*

6. This is the client's EIS case number.
7. This is the EIS program month the case is currently in.
8. This is the client's participation code (IN - In, OU - Out, DF – Disqualified/Fraud, DI – Disqualified, DJ – Disqualified for work related issues).
9. This is the last month that a benefit was authorized. When the benefit has been **authorized**, but not yet issued, this field will be in **bold** print.
10. This is the amount of the client's last benefit that was authorized. The amount in this field may not be accurate until the case has actually been worked in EIS.
11. This is the amount of the client's last benefit that was issued. Once the benefit issues, the print in field 9 is no longer bold.
12. This is the description of the type of household (Temporary Assistance: 1P – one parent, 2P – two parent, IC – Incapacitated; Food Stamps: REG – regular, SPE – special category).
13. This is the number of recipients in the household.

**Case Management System**

Commands Help

Client Number: 0000028148 Client Name: Samuelson, Taffy  
 Client SSN: 574-83-9739 Date of Birth: 03/02/1970 Phone Number: (907) 569-1234

**Case Summary** Work Activities Payment History Case Notes Client Notes Alerts FSSP

**TA Program Information**

TA Case: 00 TA Participation: IN Last TA Ben: 01/2001  
 TA Ben Amt: \$16 TA HH Type: 1P Size: 02

**EIS Program Information**

Pgm	Current Month	Part.	Pgm Status	Status Date
TA	01/2001	IN	Open	10/11/2000
ME	08/2000	IN	Open	10/11/2000

**EIS Case Information**

Office: 120 Unit: 1 CaseLoad: 02  
 TA Case Assigned to: McCormick, Gwennie  
 TA Counter: 8 BA Counter: 0

**Address Information**

Mailing Address

Residence Address

1ST ANCHORAGE AK 99504

**Additional Information**

14. These are the programs that are associated with the client's case number.
15. This is the current month of the assistance program that is displayed.
16. This is the client's participation in the assistance program that is displayed.
17. This is the current status of the program (open, closed, etc.).
18. This is the effective date of that status.
19. This is the EIS caseload number assignment.
20. This is the name of the eligibility worker for this client.
21. This is the counter for the Temporary Assistance months used.
22. This is the counter for the Baby Exempt months used.
23. This is the client's mailing and residence address.
24. This field reflects information entered in the *Directions to Home* field on the ADDR (address) screen in EIS.

All of the fields on the Case Summary Tab are read-only.



## Work Activities Tab

1. This is the Work Services Month. There is a drop-down box from which you may select other months to view on the bottom portion of the screen.
2. The current Work Services Month appears in **bold** print to call attention to the current month.
3. This is the type of Work Program involvement. JB=ATAP, ET= Food Stamps.
4. This is the program status. OP=open, CL=closed, SU=suspended, TR=transfer, RG=registered (see # 6). The codes are accessed via the drop-down box. (An old code, JR, may appear for a client; it is still attached to some clients who had an involvement during the time it was used.)
5. This is the Program Status date.
6. The Work Activities start date is colored red like the RG field as a reminder that it can be changed **before the program status is changed from RG to OP** by using the drop-down calendar.
7. This is the Work Activities closure date. This field is highlighted for entry if the case status is changed to closed. The drop-down calendar allows selection of the date.
8. This is the Work Activity closure reason. This field is highlighted for entry after the closure date is entered. The drop-down box displays the available codes for selection.
 

DF – deferred due to lack of office capacity.	DV – ended due to domestic violence
EX – exempt	IR – invalid work search referral
MH – ended due to mental health	MR – met E&T requirements
NA – never appeared at work search.	NC – penalized/noncompliance not cured
NE – TA/FS case closed-reason not employ.	SA – ended due to substance abuse
SB – ended due to other barriers	WK – ended due to employment

The screenshot shows the 'Case Management System' window. At the top, there are tabs for 'Commands', 'Work Activities', and 'Help'. Below these are input fields for 'Client Number' (0000028779), 'Client Name' (Smarte, Dad1), 'Client SSN' (574-93-0730), 'Date of Birth' (05/12/1964), and 'Phone Number' ((000) 000-0000). A 'FSSP' logo is in the top right. Below the client info are tabs for 'Case Summary', 'Work Activities', 'Payment History', 'Case Notes', and 'FSSP'. The 'Work Activities' tab is active. It contains a 'Month' dropdown (06/2001), a 'Program' dropdown (JB), a 'Pgm Status' dropdown (OP), and a 'Pgm Status Date' (05/02/2001). Below these are 'Start Date' (04/05/2001), 'Close Date' (00/00/0000), 'Cls Rsn' (a highlighted dropdown menu with callout 9), 'Penalty Rsn', 'Vol' (N), and 'Ex Rsn'. Further down are 'Office' (257), 'Unit' (9), 'Caseload' (97), and 'Case Manager Assigned' (McCormick, Gwennie). At the bottom, there are two tables: 'Work Activity' and 'Monthly Activity'. The 'Work Activity' table has columns for Month, Act, Start Date, End Date, and Auto Thru. The 'Monthly Activity' table has columns for Sched Hrs, Act Hours, Hrly Wage, Provider, and Contractor. Callout 12 points to the 'Act' column in the 'Work Activity' table. Callout 10 points to the 'Pgm Status' dropdown. Callout 11 points to the 'FSSP' tab. Callout 13 points to the 'Case Manager Assigned' field.

9. This is the penalty reason when the client is in a penalty situation. This field is highlighted for entry when the case status is changed to SU. The drop-down box displays the available codes for selection.

E&T (ET) codes

JS – didn't complete job search activity

JQ – quit or refused job or reduced hours

ET – didn't comply with other requirements

EA – didn't complete employment assessment

"Jobs" or JB codes

CS – child support non-cooperation

IP – intentional program violation

JS – didn't participate in job search

SS – didn't develop, sign, comply w/ FSSP

EA – didn't complete employment assessment

JQ – quit or refused job

SA – minor parent failed to attend school

WA – didn't participate in other work activity

10. This is the volunteer status of the client. This field defaults to N (no). If the client volunteers to participate in work activities, select the Y for yes.

11. This is the work activity exemption code from the EIS WORK screen. Possible codes are:

For E&T (ET)

DV – Active DVR

NC – Non-compliance; Disqualification

RM – Remote

SW – Sheltered Workshop Employee

IC – Ill/Incap

PG – Pregnant, 2<sup>nd</sup>/3<sup>rd</sup> trimester

SB – Substantial Barriers to Employment

NW – Exempt from Work Registration (displays when WR exempt code entered in EIS)

For JOBS (JB)

BA – Baby Exemption

CC – Inappropriate Child Care

CH – Child included in ATAP HH

HD – Family Hardship

CA – Caretaker Disabled Adult

CD – Caretaker Disabled Child

CP – No Child Care Funds

IC – Incapacitated

TR – No Transportation Funds

12. This is the Case Manager caseload assignment. Changes can be made on this screen. To update, the cursor must be in the "Caseload" field and the worker must hit <enter>.

13. The Case Manager's name changes when the caseload assignment is changed.

*Please Note: Any time the program status field is changed, the Work Activities tab must be refreshed either by clicking on the Traffic Light icon or on the H&SS logo. When the change is to close or suspend/penalize a case, dates and codes must be entered before refreshing the screen.*

The screenshot shows the 'Case Management System' window. At the top, there is a menu bar with 'Commands', 'Work Activities', and 'Help'. Below the menu is a toolbar with icons for various functions. The main area contains client information fields: Client Number (0000028779), Client Name (Smart, Dad1), Client SSN (574-93-0730), Date of Birth (05/12/1964), and Phone Number ((000) 000-0000). Below this is a tabbed interface with 'Work Activities' selected. The 'Work Services Information' section includes fields for Month (06/2001), Current Month (06/2001), Program (JB), Pgm Status (OP), Pgm Status Date (05/02/2001), Start Date (04/05/2001), Close Date (00/00/0000), Cls Rsn, Penalty Rsn, Vol (N), and Ex Rsn. Below this is a section for Office (257), Unit (9), Caseload (97), and Case Manager Assigned (McCormick, Gwennie). At the bottom, there are two tables: 'Work Activity' and 'Monthly Activity'. The 'Work Activity' table has columns for Month, Act, Start Date, End Date, and Auto Thru. The 'Monthly Activity' table has columns for Sched Hrs, Act Hours, Hrly Wage, Provider, and Contractor. Callout 14 points to the 'Work Activity' table, and callout 15 points to the 'Monthly Activity' table. Callouts 16 through 20 point to the toolbar icons.

14. This is the record of Work Activities that have been recorded. The *Month* field drives the display. Activity codes, Start and End Dates and the auto-thru data are displayed.
15. This section displays the Monthly Activity data: Hours, Hourly Wage, Provider and/or Contractor for the corresponding Activity Code.
16. Enter or update button. Click once on this button or on the H&SS logo to update or refresh the screen.
17. Add Work Component button. Click once on this button to display the *Work Activities – Add/Change* screen. You may also use the menu bar to add (Work Activities – Add) or you may right click with the cursor anywhere on the Work or Monthly Activity portion of the screen. Then select *Add*.
18. Delete Work Component button. Highlight the activity and then click once on this button to delete the selected work activity. Once all activities in a month are deleted, the month is also deleted. Clicking on the *delete* icon for a month with no components deletes the month.
19. Update Work Component button. Highlight the activity you want to update, then click once on this button. You may also right click on the selected activity and choose *update* or you may double click on the selected activity.  
*To update multiple activities, click and drag your mouse over the activities you want to update, then **hit the enter key**. You will not be able to skip over an activity using this process, but on the Add/Change screen, you can save an activity without making any changes to it.*
20. Initialize JAS Month button. First use the drop-down menu in the *Month* field to select the next month; then click once on this button to create the new month. If a component requiring hours be entered displays *000* in the Actual Hours field, an edit will display asking whether to initialize anyway. If zero hours is the correct entry, click on *yes*. If some hours were actually worked, click on *no* and use the Update function to enter the hours.

The Work Activity Add/Change screen allows you to add or update work activities for a client. The *Month* field on this screen will automatically display the same as the *Month* field on the main Work Activities screen. You may change the month by using the Month drop-down box (1), and selecting the month in which activities need to be added.

*If the month selected is other than the Current Month on the main Work Activities screen, both the start and end dates of any added activities must be within the selected month.* For example, if the current month showing on the Work Activities tab is 12/2000, but you need to enter an activity for the month of November, you will need to change the Month field on this screen to 11/2000, and the start and end dates for the component must be within the month of November.

However, if you are adding an activity in the current month, and you know it is going to continue for several months, you can leave the end date as 9s and enter an auto thru date. The system will roll the activity and its information from month to month through the auto thru date. You can go to the activity at any time and update hours, wages, etc. or change the thru date or end the activity.

To select a Work Activity Code, click on the drop-down arrow for the *Activity* field. (See previous page—the arrow disappears when it is clicked on to bring up the list of activity codes).

#### E&T (ET) Activity Codes

AS	Initial assessment	J1	Independent work search
B3	Remediation	S2	Gap due to good cause
E3	English as a second language	T1	Job Corps
E6	GED preparation, adult	VC	Vocational counseling
E7	Literacy improvement	V1	Vocational training

#### JOBS (JB) Codes

AS	Initial assessment	F3	English as a second language
BK	Break in countable work activities	HS	High school completion
B1	Substance abuse	I1	Self-initiated post-secondary education
B3	Remediation of other barriers	I3	Self-initiated job skills training
B4	Domestic violence counseling	J1	Self-initiated work search
B5	Mental Health	J3	Structured work search
CN	Conciliation	OJ	On-the-job training
CW	Job sampling	PS	Program Service Aide
C1	Community service work	P1	Post-secondary education
C2	Community work service subsistence	P3	Job skills training
C7	Community work service, public housing	SE	Self-employment
E5	GED preparation, teen parent	SW	Seasonal work
E6	GED preparation, adult	S2	Gap due to good cause
E7	Literacy improvement	VC	Vocational counseling
		WK	Paid employment
		X1	Contractual work search

Case Management System

Work Activities - Add/Change

Commands

Client Number: 0000028734 Client Name: Fredricks, Jo Program: JB Pgm Status: OP

Pgm Start Date: 12/07/2000 Current Month: 12/2000

Month: 12/2000 Save Activity

----- Work Activity ----- +----- Monthly Activity -----

Activity: AS Start Date: End Date: 99/99/9999 Sched Hours: Act Hours: Hourly Wage:

Auto Thru: December 2000

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	

Today: 4/3/2001

Provider: Contractor:

Select the desired start and end dates by clicking on the arrows for those fields. A calendar will display for your convenience and you need only click once on the date to select it.



[illegible]

If using the Auto-Thru feature, the End Date should remain 99/99/9999. For the End Date, a box asking *Display Calendar?* appears. If you have clicked on the End Date drop-down arrow and realized you want to leave the end date open (9's), just click on *no*.

To set an Auto-Thru month, click on the arrow next to that field and select the month you want to use. Auto-thrus of up to one year are allowed.

Under Monthly Activity, enter the number of hours in the *Act Hours* (Actual Hours) field. It is from this field that Participation Reports are drawn. Use of the *Sched Hours* (Scheduled Hours) field is optional and entry depends on office policy.

If the code requires a wage, the Hourly Wage field is used.

Month	Act	Start Date	End Date	Auto Thru
12/2000	AS	12/07/2000	99/99/9999	

Sched Hours	Act Hours	Hrly Wage	Provider	Contractor
000	000			

Optional fields include Provider (2) (three character free format field) and Contractor (3) (some codes are provided in the drop-down box, but the field accepts free-format codes as well).

Once all data has been recorded, click on the *Save Activity* button (4). You may add other activities after the data has been saved.

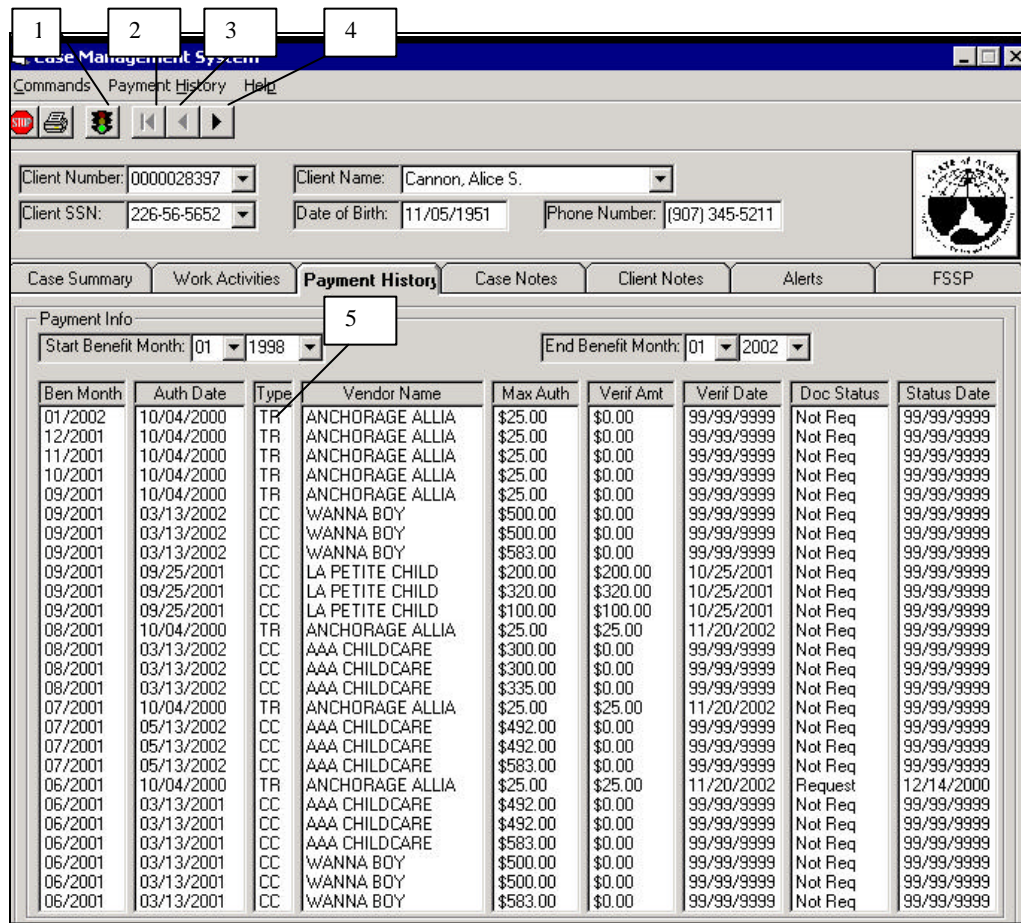
*If you have selected multiple activities on the main Work Activities screen for updating, the activities will appear in sequence. You will need to make your changes and save the first activity and then click on the Traffic Light (5) on the tool bar to enter that activity. You will then see the next activity. Just repeat the process until all activities have been updated. Clicking on the Traffic Light after saving the last activity returns you to the main Work Activities screen.*

If you need to change a saved activity, double click on any field of that activity in the display in the lower half of the screen. This returns the component to the entry fields. Make your changes and save the activity again.

To return to the Work Activities tab and enter your saved activities there, click on the Traffic Light (5).



## Payment History Tab



Case Management System

Commands Payment History Help

Client Number: 000028397 Client Name: Cannon, Alice S.  
 Client SSN: 226-56-5652 Date of Birth: 11/05/1951 Phone Number: (907) 345-5211

Case Summary Work Activities **Payment History** Case Notes Client Notes Alerts FSSP

Payment Info  
 Start Benefit Month: 01 1998 End Benefit Month: 01 2002

Ben Month	Auth Date	Type	Vendor Name	Max Auth	Verif Amt	Verif Date	Doc Status	Status Date
01/2002	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$0.00	99/99/9999	Not Req	99/99/9999
12/2001	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$0.00	99/99/9999	Not Req	99/99/9999
11/2001	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$0.00	99/99/9999	Not Req	99/99/9999
10/2001	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$0.00	99/99/9999	Not Req	99/99/9999
09/2001	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$0.00	99/99/9999	Not Req	99/99/9999
09/2001	03/13/2002	CC	WANNA BOY	\$500.00	\$0.00	99/99/9999	Not Req	99/99/9999
09/2001	03/13/2002	CC	WANNA BOY	\$500.00	\$0.00	99/99/9999	Not Req	99/99/9999
09/2001	03/13/2002	CC	WANNA BOY	\$583.00	\$0.00	99/99/9999	Not Req	99/99/9999
09/2001	09/25/2001	CC	LA PETITE CHILD	\$200.00	\$200.00	10/25/2001	Not Req	99/99/9999
09/2001	09/25/2001	CC	LA PETITE CHILD	\$320.00	\$320.00	10/25/2001	Not Req	99/99/9999
09/2001	09/25/2001	CC	LA PETITE CHILD	\$100.00	\$100.00	10/25/2001	Not Req	99/99/9999
08/2001	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$25.00	11/20/2002	Not Req	99/99/9999
08/2001	03/13/2002	CC	AAA CHILDCARE	\$300.00	\$0.00	99/99/9999	Not Req	99/99/9999
08/2001	03/13/2002	CC	AAA CHILDCARE	\$300.00	\$0.00	99/99/9999	Not Req	99/99/9999
08/2001	03/13/2002	CC	AAA CHILDCARE	\$335.00	\$0.00	99/99/9999	Not Req	99/99/9999
07/2001	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$25.00	11/20/2002	Not Req	99/99/9999
07/2001	05/13/2002	CC	AAA CHILDCARE	\$492.00	\$0.00	99/99/9999	Not Req	99/99/9999
07/2001	05/13/2002	CC	AAA CHILDCARE	\$492.00	\$0.00	99/99/9999	Not Req	99/99/9999
07/2001	05/13/2002	CC	AAA CHILDCARE	\$583.00	\$0.00	99/99/9999	Not Req	99/99/9999
06/2001	10/04/2000	TR	ANCHORAGE ALLIA	\$25.00	\$25.00	11/20/2002	Request	12/14/2000
06/2001	03/13/2001	CC	AAA CHILDCARE	\$492.00	\$0.00	99/99/9999	Not Req	99/99/9999
06/2001	03/13/2001	CC	AAA CHILDCARE	\$492.00	\$0.00	99/99/9999	Not Req	99/99/9999
06/2001	03/13/2001	CC	AAA CHILDCARE	\$583.00	\$0.00	99/99/9999	Not Req	99/99/9999
06/2001	03/13/2001	CC	WANNA BOY	\$500.00	\$0.00	99/99/9999	Not Req	99/99/9999
06/2001	03/13/2001	CC	WANNA BOY	\$500.00	\$0.00	99/99/9999	Not Req	99/99/9999
06/2001	03/13/2001	CC	WANNA BOY	\$583.00	\$0.00	99/99/9999	Not Req	99/99/9999

This screen displays the Supportive Service and Child Care authorizations that the selected client has received. The list of Supportive Services *Type* codes (5) definitions can be found by using *Help, F1*. The *Max Auth* field represents the maximum amount that will be paid for a particular service. The authorization is a “promise to pay” by Public Assistance. The *Verif Amt* (Verified Amount) represents the amount that will actually be paid or has been paid to a vendor or provider. If there is data in these fields, then the service has been rendered, the provider or vendor has submitted a bill and DPA has approved payment.

The Document Status and Document Date fields refer to the interface with the Alaska Statewide Accounting System (AKSAS). Examples of AKSAS status: rejected-didn’t pay for some reason; issued-check sent; redeemed-check cashed; not req-entry not selected for payment by EIS batch job; request-EIS batch job selected entry; warrant will issue with the next AKSAS run.

When first accessed, Payment History displays the first month of the current year in the Start Benefit Month fields and the current month and year in the End Benefit Month fields. To display a different payment history period, select the month(s) and year(s) using the drop-down boxes for those fields; click once on the Traffic Light on the tool bar (1) or on the H&SS logo. You may also use the <enter> key on your keyboard. The new payment history period displays in the appropriate fields. This new period continues to display until a new range is selected.

The *Next Page* button(4), *Previous Page* button (3) and the *Reset Payment Display* button (2) on the tool bar allow for easy viewing of multiple pages of payments.

## Case Notes Tab

Case Management System

Commands Case Notes Help

Client Number: 0000028397 Client Name: Cannon, Alice S.  
 Client SSN: 226-56-5652 Date of Birth: 11/05/1951 Phone Number: (907) 345-5211

Case Summary Work Activities Payment History **Case Notes** Client Notes Alerts FSSP

Case Notes

Case Number: 00007454 Case Name: Cannon, Alice S.

Record Date	Record Time	Case Note Title	Who Created Case Note?
01/23/2002	09:37.47	showing update button	BECKTEST K
01/17/2002	12:26.44	I want to test this again	TST-BSG G
01/15/2002	13:46.45	Test in EIS	TST-RUTH M
01/15/2002	13:42.01	Testing for Case managers	TST-RUTH M
01/15/2002	07:47.13	ANRO Testing	TST-RUTH M
01/08/2002	14:05.13	Testing	TST-RUTH M
12/05/2001	11:57.09	Testing	TST-RUTH M
11/27/2001	10:34.38	Case note addition	STUDENT06 W
11/14/2001	13:11.48	The New FSSP	TST-RUTH M
08/23/2001	15:52.20	this is a coasts for child	PAULY-ANNA S
08/23/2001	11:04.47	next	TST-BSG G
08/23/2001	11:03.52	hello	TST-BSG G
08/23/2001	11:02.48	my note	TST-BSG G
08/23/2001	10:57.06	new note	TST-BSG G
08/23/2001	10:56.03	thkajlksdkj skfj akj	TST-BSG G
08/23/2001	10:51.55	title	TST-BSG G
07/10/2001	09:23.55	this is another test	TST-RUTH M
07/10/2001	09:11.39	test	TST-RUTH M
07/10/2001	09:07.03	this is a test	TST-RUTH M
06/26/2001	08:29.18	Testing Case Notes	TST-BSG G
06/15/2001	10:10.59	Case Notes	TST-RUTH M

This screen allows you to view and add/update Case Notes (CANOs in EIS). All electronic Case Notes entered in either EIS or CMS will be available for view in both programs – this includes CANOs previously entered in EIS.

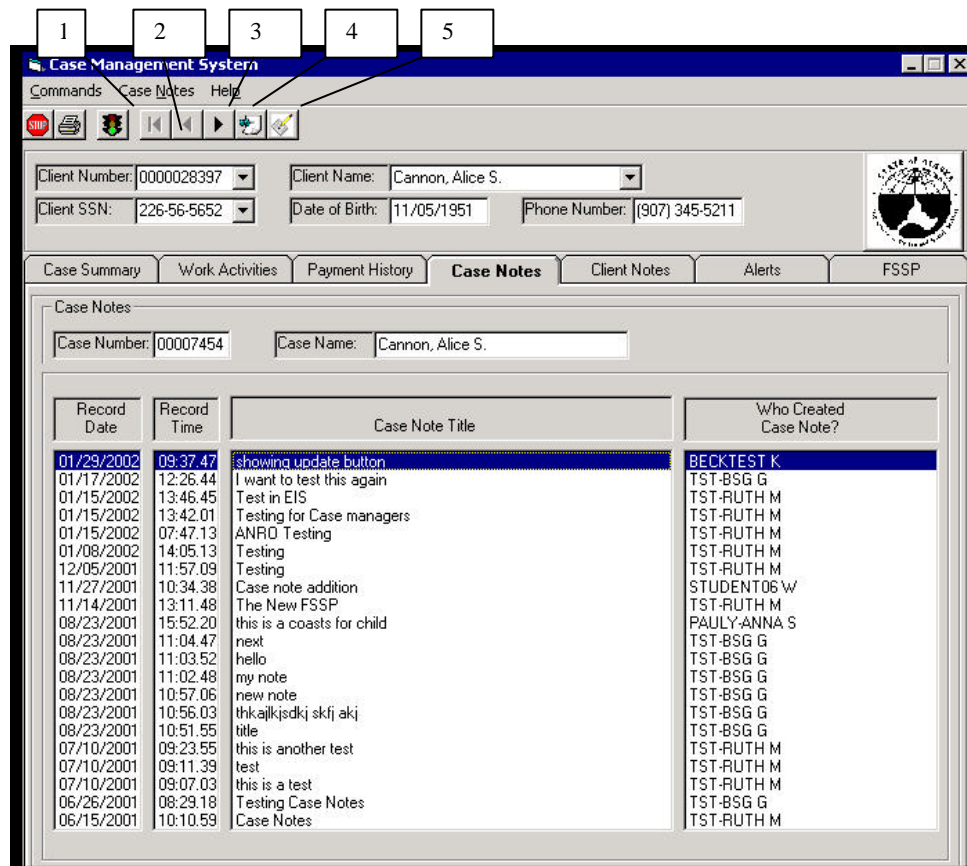
To create/add a new Case Note, you may choose one of several different methods:

1. Click once on the *Add Case Note* button (4) on the tool bar.
2. Click on *Case Notes* on the menu bar and then select *Add*.
3. Right click and then select *Add*.

After function 1, 2 or 3 above, a new Case Note window will display. You may enter the title and text of your case note from this window.

Similarly, to bring up the Case Note Display window, you may either

1. Double click on a selected title
2. Highlight a title and then select *Case Notes* from the menu bar and then select *display*.
3. Highlight a title and then right click. Then click once on *display*.
4. Additionally, multiple notes may be selected for viewing. Click and drag the mouse over the notes to highlight and hit the enter key. The first note will display. Click on the Stop Sign to display each case note in sequence.



The Update Case Note (5) button on the tool bar *displays only* when a case note is available for updating and that note is highlighted. Case notes can only be updated or edited by the person who originally created them, and only on the date they are created.

To update a case note, highlight the note. Then,

1. Double click on the note, or
2. Click on the button, or
3. Click on the *Case Notes* menu field, and then click on *update*.

The Case Note Display window will appear, and you may make changes to your case note.

**Please Note:** Case Notes can be deleted only by the DPA Systems Operations Help Desk (DPA EIS Helpdesk or [EISHELP@health.state.ak.us](mailto:EISHELP@health.state.ak.us).) For the Help Desk to delete a case note, a unit supervisor or lead worker must submit the request and include case number, case note title, date, and time.

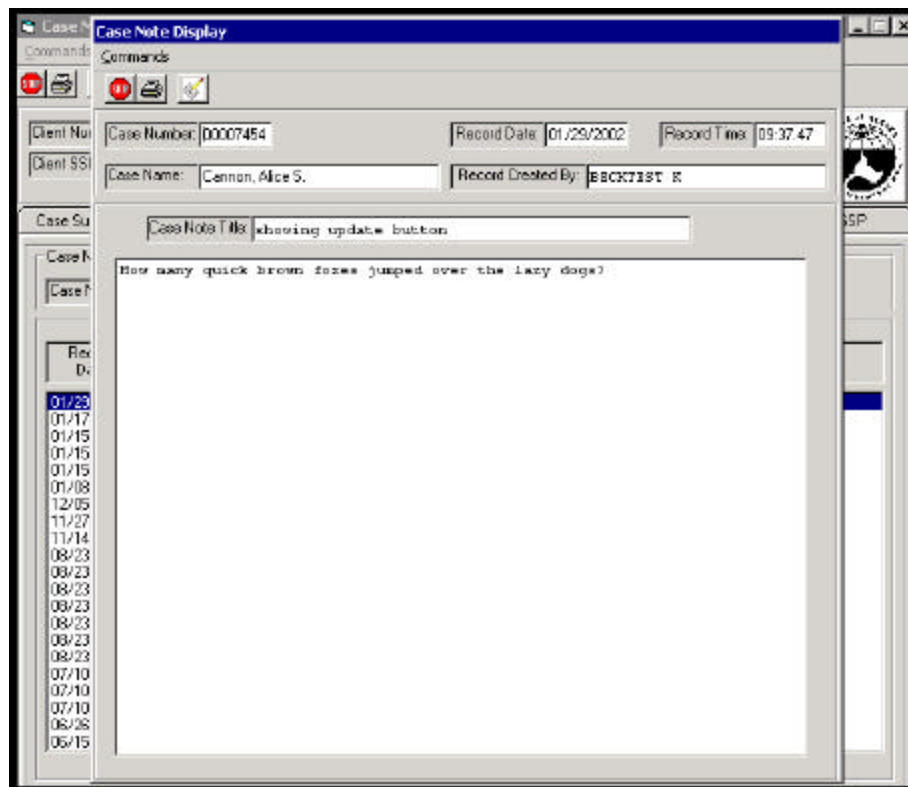
You can page forward (3) and page backward (2) through the list of case notes or reset to the top of the list (1).

An additional function of case notes is the ability to copy and paste from them into EIS or Word or Excel documents, and vice versa. This is accomplished by highlighting the text or information you want to copy, right clicking on the mouse, and selecting *copy*. Then move the text to the document you want it to be a part of, right click again, and select *paste*.

Word wrap, spell check and grammar check are available for case notes. To turn spell check and grammar check on or off, select *Tools* from the menu bar and then select the desired function.

Case Notes entered in EIS will display in CMS exactly as they were entered. If the note was entered in EIS without regard to a word splitting between the end of one line and the beginning of the next, word wrap in CMS cannot fix this (unless the entry is accessed in CMS on the date the case note was entered by the worker who entered it in EIS). However, notes entered in CMS will word wrap, and this will carry over to the display in EIS.

To save a Case Note, click once on the Traffic Light icon located on the tool bar. Please note that when you click on the Traffic Light to save a case note, the entire CMS “disappears” from your display. It reappears once the data has been updated.



This screen represents a display of a previously entered Case Note. This particular case note is available for updating. To update or edit the note, click on the Pencil and Paper icon on the tool bar. The case note fields open up for entry, and the Traffic Light icon replaces the Pencil and Paper. The format of the note may change somewhat. The changes may be corrected as part of updating the case note. Once your changes are made, click on the Traffic Light to enter the changed note into the system. To exit this screen and to return to the Case Note Tab without making any changes, simply click once on the Stop Sign button near the tool bar or you may click once on *Commands* and then select *Exit*.

A scroll bar on the Display Case Note screen allows viewing of multi-page case note entries. To print any case note, simply click on the printer icon and select *print* on the window that appears. If the note is more than one page, the *printing* window will flash on and off as each new page is printed.

## Client Notes Tab

The screenshot shows the 'Case Management System' window with the 'Client Notes' tab selected. At the top, there are fields for Client Number (0000029427), Client Name (Andrews, Maureen), Client SSN (482-30-4888), Date of Birth (11/01/1971), and Phone Number ((000) 000-0000). Below these are tabs for Case Summary, Work Activities, Payment History, Case Notes, Client Notes (selected), Alerts, and FSSP. The Client Notes section contains a sub-form with Client Number and Client Name fields. Below this is a table with four columns: Record Date, Record Time, Client Note Title, and Who Created Client Note?. The table has one row with placeholder text 'End of Client Notes' and a row with a grid of 'X's.

Record Date	Record Time	Client Note Title	Who Created Client Note?
XXXXXX	XXXXXX	End of Client Notes	XXXXXX

Client Notes work the same as Case Notes in regards to displaying entries and adding or updating entries.

**\*\*Client Notes have not yet been approved for use. Field Services is developing a Client Note Guideline. Do not use this function on the CMS until the guidelines have been approved.**



## Alerts Tab

Case Management System

Commands Client Alerts Help

Client Number: 0000029427 Client Name: Andrews, Maureen

Client SSN: 482-30-4888 Date of Birth: 11/01/1971 Phone Number: (000) 000-0000

Case Summary Work Activities Payment History Case Notes Client Notes Alerts FSSP

Client Alerts Client Alerts by Caseload

Case/Client Name	Client Num	Message	Due Date
ANDREWS, MAUREEN	0000029427	testing 041-4-01 & 254-3-31	01/30/2002
End of Alerts	xxxxxxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx	xx/xx/xxxx

All: 0 Caseload: 31 FSD: 254 Unit: 3 Caseload: 31

The Alerts screen allows a case manager to set alerts or reminders about a client's progress or activity. This screen will display client alerts only. Case alerts remain with EIS. The forward and backward arrows and reset to the top icons have been seen on several other screens. They work the same way here: when there are multiple pages of alerts, you can page forward or backward one page at a time, or reset to the top of the alerts list at any time. As of Feb. 1, 2002, the *Client Alerts by Caseload* tab is still in the testing and development stages in our Test Region. In Production Region, where case managers and eligibility workers enter information for their clients, this tab will be invisible.

There are several methods available for setting a new alert:

1. Click once on the *Add Alert Message (Push-Pin)* button on the tool bar.
2. At the menu bar, click on *Client Alerts* and then select *Add*.
3. Right click with the mouse and then select *Add*.

There are also several options for deleting an alert:

1. Highlight the alert message and click once on the *Delete Alert* button (the garbage can).
2. Highlight the alert message and click on *Client Alerts* on the menu bar and then select *Delete*.
3. Highlight the alert message and right click with the mouse. Select *Delete*.

Once the *Add* function has been selected, a new window will appear which will allow for creation of the alert:

The screenshot shows a 'Case Management System' window with a menu bar (Commands, Client Alerts, Help) and a toolbar. The main area displays client information: Client Number (0000029427), Client Name (Andrews, Maureen), Client SSN (482-30-4888), Date of Birth (11/01/1971), and Phone Number ((000) 000-0000). A 'Create Alert' dialog box is open, containing fields for Client Number (0000029427), Client Name (Andrews, Maureen), Due Date (a dropdown menu), and Message (a text input field). The dialog box also has a 'Due' label and a date '01/30' with a 'XX/XX' placeholder. At the bottom of the main window, a status bar indicates 'Total Alerts found: 00001'.

Client Alerts	
Due	01/30
XX/XX	

Total Alerts found: 00001

**Case Management System**

Commands Client Alerts Help

Client Number: 0000029427 Client Name: Andrews, Maureen

Client SSN: 482-30-4888 Date of Birth: 11/01/1971 Phone Number: (000) 000-0000

Case Summary Work Activities Payment History Case Notes Client Notes **Alerts** FSSP

**Client Alerts** Client Alerts by Caseload

**Create Alert**

Due Date: 01/30

Client Number: 0000029427 Client Name: Andrews, Maureen

Due Date: Message:

**January 2002**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: 1/31/2002

Total Alerts found: 00001

If you click once on the drop-down arrow on the Due Date field, a calendar will display which will allow you to select a due date for your alert from the current date forward. (You cannot set an alert with a due date in the past.) The current month displays in black but you may choose a different month by clicking on the forward arrow on the calendar. (There is a backward arrow on the calendar, but since you cannot set alert due dates in the past, it is not functional.)

Once you have selected a due date, you may tab over to the Message field. This field has a 30-character capacity.

Spell check and grammar check are available for the Message field. If you wish to modify the spell and grammar check, click *Tools* at the menu bar and then select the desired option.

To save the alert message, click once on the Traffic Light. The window seems to disappear for a few seconds as it updates, but the Client Alert Tab screen will return momentarily with the new alert displayed.

If you want to change an alert message or due date, highlight the alert and click on the *pencil and paper* icon. The Update Alert window displays. You may either change the text of the alert or bring up the calendar to change the due date. Due to the 30-character capacity of the message field, you may need to highlight the current message and retype it, unless your changes will fit within the 30 character limit. Click on the *traffic light* to enter the changed alert. If you exit this window without clicking on the traffic light, you will receive an edit message reminding you the alert you selected to change will be deleted.



## FSSP Tab

**Case Management System**

Commands: FSSP Help

Client Number: 0000029751 Client Name: Alex21, Mom  
 Client SSN: 048 34-8468 Date of Birth: 07/29/1971 Phone Number: (000) 000-0000

Case Summary Work Activities Payment History Case Notes Client Notes Alerts **FSSP**

Alaska Family Self-Sufficiency Plan History

Plan Start Date: FSSP Title:  
 Est. Goal Date: Review Date: Exempt Thru:

Goals

Short Term Goals Long Term Goals

Steps Needed Activity Plan Services Needed Additional Information

Work Activities: ☐ Employment - Full time ☐ Employment - Part time ☐ Job Search ☐ Volunteer Work Experience ☐ Job Sampling ☐ On-the-job training ☐ Job Readiness

Education/Training: ☐ High School diploma ☐ GED ☐ ESL ☐ Literacy improvement ☐ Job skill training ☐ Employment counseling

Other Activities: ☐ Life Skills instruction ☐ Parenting skills workshop ☐ Establish paternity ☐ Help CSED locate absent parent ☐ Get a child support order in place ☐ Substance abuse assessment/treatment

To open an FSSP for entry, either click on the pushpin icon or *FSSP* in the upper left hand side of the screen. Select by clicking, *Create Blank FSSP*.

**Case Management System**

Commands: FSSP Help

Get on FSSP  
 Update FSSP  
**Create Blank FSSP**  
 Delete  
 Spelling Check  
 Grammar Check

Client Number: 0000029751 Client Name: Alex21, Mom  
 Client SSN: 048 34-8468 Date of Birth: 07/29/1971 Phone Number: (000) 000-0000

Case Summary Work Activities Payment History Case Notes Client Notes Alerts **FSSP**

Alaska Family Self-Sufficiency Plan History

Plan Start Date: FSSP Title:  
 Est. Goal Date: Review Date: Exempt Thru:

Goals

Short Term Goals Long Term Goals

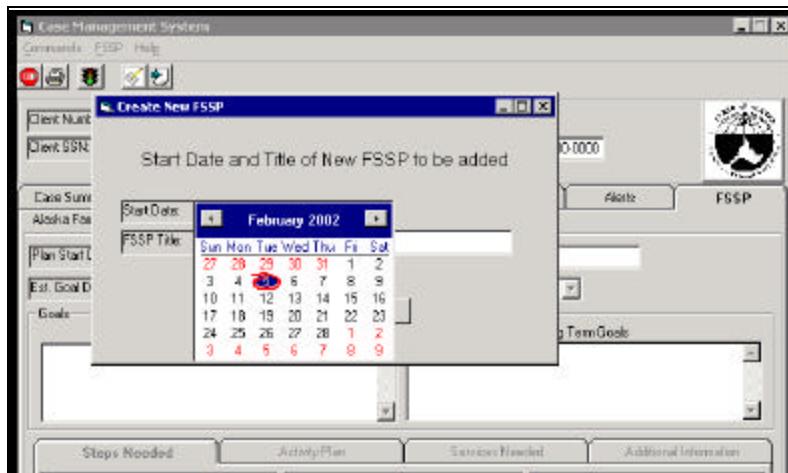
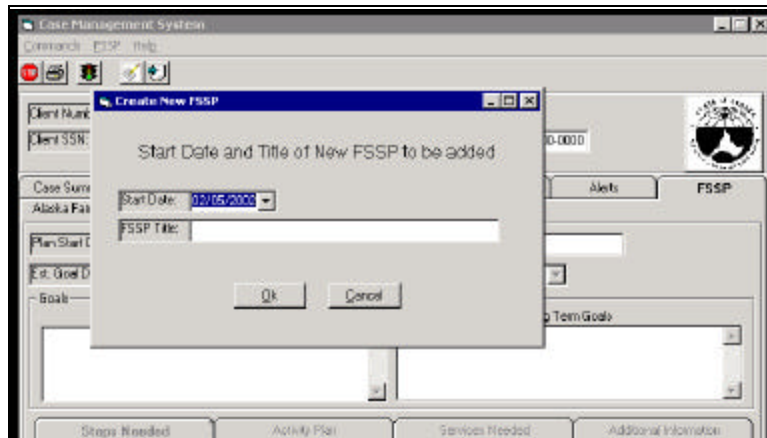
Steps Needed Activity Plan Services Needed Additional Information

Work Activities: ☐ Employment - Full time ☐ Employment - Part time ☐ Job Search ☐ Volunteer Work Experience ☐ Job Sampling ☐ On-the-job training ☐ Job Readiness

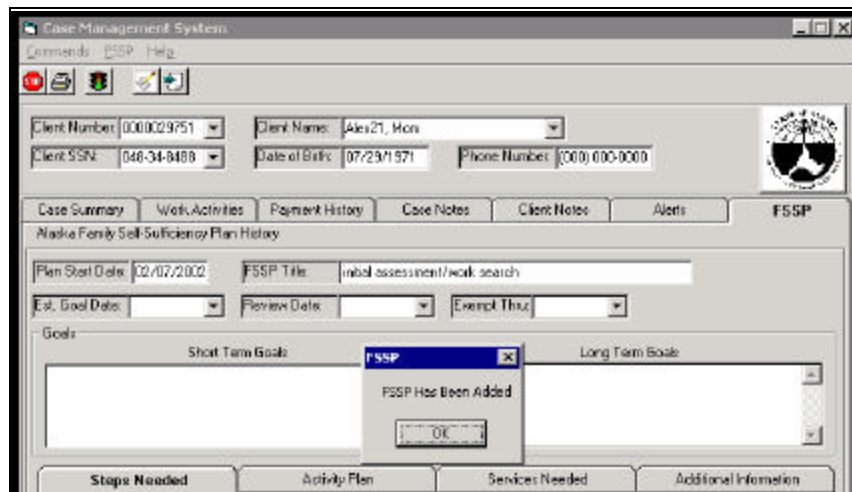
Education/Training: ☐ High School diploma ☐ GED ☐ ESL ☐ Literacy improvement ☐ Job skill training ☐ Employment counseling

Other Activities: ☐ Life Skills instruction ☐ Parenting skills workshop ☐ Establish paternity ☐ Help CSED locate absent parent ☐ Get a child support order in place ☐ Substance abuse assessment/treatment

Either action will bring up a start date entry box with the current date displayed:



By clicking in the *Start Date* field, a drop-down calendar will appear. Use this calendar to select your plan start date. In the next field you may enter an optional title if you want to further identify your FSSP. Click on *OK*. An edit box appears on the screen showing the FSSP has been added. Click on *OK* in that box as well.



For entries in the other date fields, click on the arrow for the appropriate field and then select a date from the drop-down calendar. If you pull up a calendar in error, press the *Esc* key on your keyboard. If you enter an incorrect date, click on the arrow for that field to bring up the calendar again to select a new date or hit *Esc* to delete the date.

The screenshot shows the Case Management System (CMS) interface. At the top, there are fields for Client Number (000021751), Client Name (Alex, Mary), Client SSN (645-34-8488), Date of Birth (07/25/1971), and Phone Number (000) (000-0000). Below these are tabs for Case Summary, Work Activities, Parent History, Case Notes, Client Notes, Alerts, and FSSP. The FSSP tab is selected, showing the 'Alaska Family Self-Sufficiency Plan History'. The 'Plan Start Date' is 02/07/2002, and the 'FSSP Title' is 'Initial assessment/work search'. The 'Est. Goal Date' field is highlighted with a calendar pop-up showing February 2002. The 'Review Date' field is empty. The 'Exempt Thru' field is empty. The 'Steps Needed' section is expanded, showing 'Employment - Full time' and 'Education/Training'. The 'Employment - Full time' section includes checkboxes for 'Employment - Full time', 'Job Search', 'Volunteer/Work Experience', 'On-the-job training', and 'Job Readiness'. The 'Education/Training' section includes checkboxes for 'High School diploma', 'GED', 'ESL', 'Literacy improvement', 'Job skill training', and 'Employment counseling'. The 'Other Activities' section includes checkboxes for 'Life Skills instruction', 'Parenting skills workshop', 'Establish paternity', 'Help CSEB locate absent parent', 'Get a child support order in place', and 'Substance abuse assessment/treatment'.

The *Est. Goal Date* information is entered in the text near the top of the printed FSSP: *I expect my family to be able to reach this goal by \_\_\_\_\_.*

Enter the date when the client should have an appointment to review their FSSP in the *Review Date* field. This date prints in the *I agree to contact my caseworker no later than \_\_\_\_\_* section on the back (or page 2) of the FSSP form.

Make an entry in the *Exempt Thru* field only if the client is exempt from work requirements. When the FSSP prints, if an exempt thru date is entered, there will be an X next to the statement, *Even though I am exempt from work requirements until (exempt through date)* section. If no *Exempt Thru* date is entered, the X will appear next to the statement *I am required to participate ...*

This screenshot is identical to the one above, showing the Case Management System (CMS) interface with the FSSP form. The 'Est. Goal Date' field is highlighted with a calendar pop-up showing February 2002. The 'FSSP Title' field contains 'Initial assessment/work search'. The 'Exempt Thru' field is empty. The 'Steps Needed' section is expanded, showing 'Employment - Full time' and 'Education/Training'. The 'Employment - Full time' section includes checkboxes for 'Employment - Full time', 'Job Search', 'Volunteer/Work Experience', 'On-the-job training', and 'Job Readiness'. The 'Education/Training' section includes checkboxes for 'High School diploma', 'GED', 'ESL', 'Literacy improvement', 'Job skill training', and 'Employment counseling'. The 'Other Activities' section includes checkboxes for 'Life Skills instruction', 'Parenting skills workshop', 'Establish paternity', 'Help CSEB locate absent parent', 'Get a child support order in place', and 'Substance abuse assessment/treatment'.

You may save your FSSP as you go along or you may save it upon completion. To save your FSSP, take one of the following actions:

- Click on the H&SS logo.
- Click on the green *Traffic Light* icon.
- Click on the *Pencil and Paper* icon and select *Update FSSP*.
- Click on *FSSP* to display a drop-down list and select *Update FSSP*.
- Click on the *Signed Date* field.

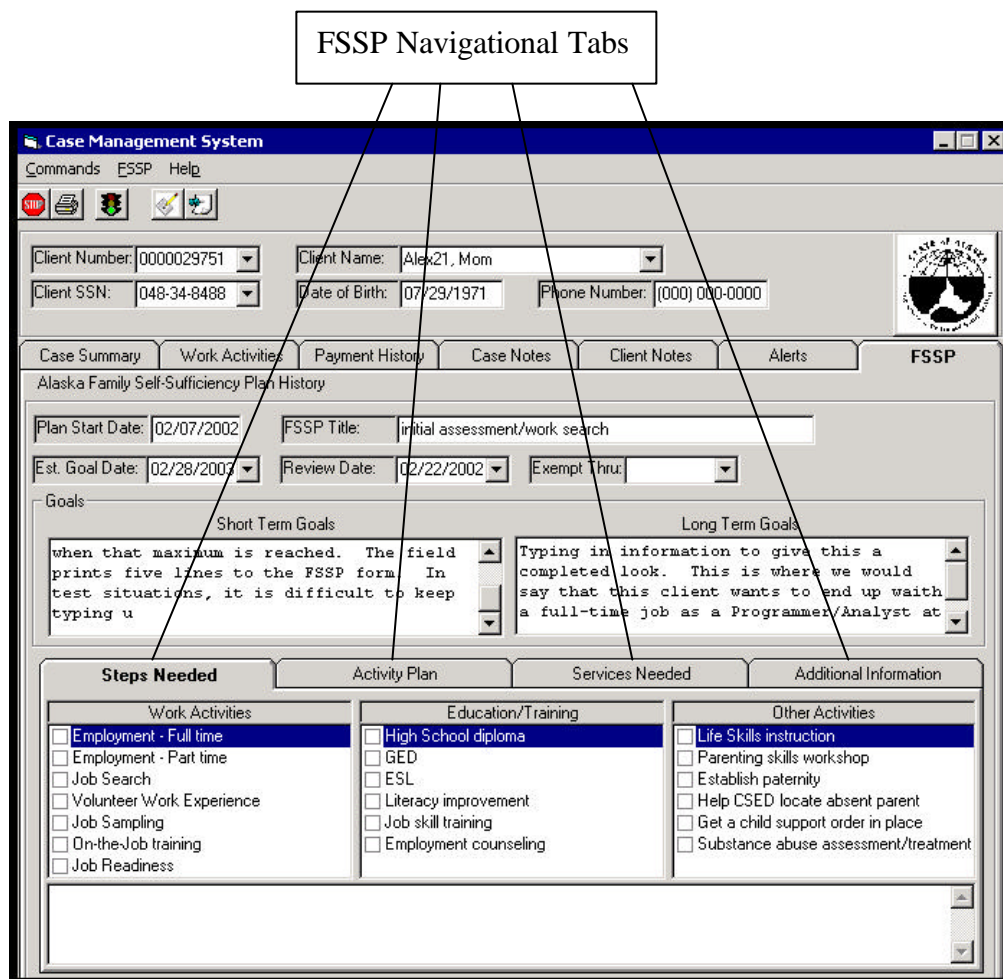
Additionally, if you pull up a different client from your drop-down Client Name (or Client SSN or Client Number) List, your FSSP will be saved or updated. However, if you search for a brand new client, FSSP information for the client you were working on will not be saved.

Any time one of the save actions is initiated, spell and grammar check are activated. For more information on spell and grammar check, see page 38.

Once you have used one of the aforementioned methods to save information on the FSSP, you will not lose the information if the system goes down or you pull up another FSSP for the same client. Keep in mind you can change and re-save information on the same FSSP until you have entered a date in the *Signed Date* field and saved the document with this entry.

Information for the *Short and Long Term Goals* boxes is entered in free form. The boxes contain up to 250 characters. An edit appears when the maximum is reached. Only five lines of your entry will print on the FSSP. If you have entered more than five lines (e.g., a list of seven items) the additional lines will not print on the form, even though the information is available on-line. (The font size in CMS is different from what actually prints on the form. You may type six or seven lines into CMS, but the lines will shift a bit when printed, and you will see five lines on the completed form. The 250 characters will print on the form. If you want separate lines, you will have to use your *Enter* key to create the end of each line.)

The screenshot shows the Case Management System (CMS) interface. At the top, there's a menu bar with 'Commands', 'FSSP', and 'Help'. Below the menu bar are several icons. The main form area has fields for 'Client Number' (0000029751), 'Client Name' (Alex21, Mom), 'Client SSN' (048-34-8488), 'Date of Birth' (07/29/1971), and 'Phone Number' ((000) 000-0000). There's a 'Case Summary' tab and an 'FSSP' tab. The 'FSSP' tab is active, showing 'Alaska Family Self-Sufficiency Plan History'. Below this, there are fields for 'Plan Start Date' (02/07/2002), 'FSSP Title' (initial assessment/work search), 'Est. Goal Date' (02/28/2003), 'Review Date' (02/22/2002), and 'Exempt Thru'. There are also sections for 'Goals' (Short Term Goals and Long Term Goals). A pop-up window titled 'CMDDev' is visible, showing 'Max length of 250 reached' and an 'OK' button. At the bottom, there's a 'Steps Needed' section with three columns: 'Work Activities', 'Education/Training', and 'Other Activities'. Each column has a list of checkboxes for various activities.



These tabs point to various sections of a printed FSSP. *Steps Needed* reveals the check-off boxes for the *Steps Needed to Achieve Self-Sufficiency* portion of the FSSP. *Activity Plan* shows the *Self-sufficiency activity plan* table. *Services Needed* displays the table for *Services needed to accomplish this plan*. Information entered under the *Additional Information* tab will print on page 2 of the FSSP just above the Release of Information paragraph. Simply click on the desired tab with your mouse to open a section.



**Case Management System**

Commands FSSP Help

Client Number: 0000029751 Client Name: Alex21, Mom

Client SSN: 048-34-8488 Date of Birth: 07/29/1971 Phone Number: (000) 000-0000

Case Summary Work Activities Payment History Case Notes Client Notes Alerts **FSSP**

Alaska Family Self-Sufficiency Plan History

Plan Start Date: 02/07/2002 FSSP Title: initial assessment/work search

Est. Goal Date: 02/28/2003 Review Date: 02/22/2002 Exempt Thru:

Goals

Short Term Goals

when that maximum is reached. The field prints five lines to the FSSP form. In test situations, it is difficult to keep typing u

Long Term Goals

Typing in information to give this a completed look. This is where we would say that this client wants to end up with a full-time job as a Programmer/Analyst at

Steps Needed Activity Plan Services Needed Additional Information

Work Activities

☐ Employment - Full time

☐ Employment - Part time

☒ Job Search

☐ Volunteer Work Experience

☐ Job Sampling

☐ On-the-Job training

☐ Job Readiness

Education/Training

☐ High School diploma

☐ GED

☐ ESL

☐ Literacy improvement

☒ Job skill training

☐ Employment counseling

Other Activities

☐ Life Skills instruction

☐ Parenting skills workshop

☐ Establish paternity

☐ Help CSED locate absent parent

☐ Get a child support order in place

☐ Substance abuse assessment/treatment

Wrk Activ--Getn TA 10 Form completed

Ed/Trng--contact Div of Voc Rehab

Other Activ--get into Occupational Therapy

Under the *Steps Needed* tab, you can check off specific activities or steps by just clicking on the desired box with your mouse. We were unable to program a “☐ \_\_\_\_\_” for each section, so the free-form text box below the check-off areas allows case managers to enter any additional steps or activities. The free-form box allows up to 250 characters and prints on up to three lines. Information entered in the free-form area prints on the FSSP in a box titled *Other Steps Needed*.

To add an activity, put your mouse/cursor anywhere in the text portion of the table and right click. This brings up the little box with **Add** in bold. Click on **Add**.

When you click on **Add**, text fields matching the *Activity Plan* table appear at the bottom of the screen. CMS automatically inserts today's date as a *Start Date* but you may change the date with the drop-down calendar for the field. All fields on this screen require entry.

Enter the activity information by tabbing to each field. The *Activities/hrs per week* field allows 175 characters and up to three lines. When you tab to the *Review Date* field, you will see a date 30 days from the start date. This date can be changed using the drop-down calendar.

The screenshot shows the 'Case Management System' window. At the top, there are fields for Client Number (000025701), Client Name (Alex21\_Mon), Client SSN (048-34-8488), Date of Birth (07/25/1971), and Phone Number (000) 000-0000. Below these are tabs for Case Summary, Work Activities, Payment History, Case Notes, Client Notes, Alerts, and FSSP. The 'Work Activities' tab is selected, showing the 'Alaska Family Self-Sufficiency Plan History'. It includes fields for Plan Start Date (02/07/2002), FSSP Title (Initial assessment/work search), Est. Goal Date (02/28/2003), Review Date (02/22/2002), and Exempt Thru. A 'Goals' section has 'Short Term Goals' and 'Long Term Goals' text areas. A 'Max Length' dialog box is open, indicating 'Max length of 175 reached'. Below the goals are tabs for Steps Needed, Activity Plan, Services Needed, and Additional Information. The 'Activity Plan' tab shows a table with columns: Start Date, Activities/hrs per week, Who will do it?, and Review Date. An 'Add Activity' section at the bottom has a table with the same columns. The first row in the 'Add Activity' table has Start Date (02/07/2002), Activities/hrs per week (Attend Work Search at Home Job Service 20 hours per week. See case manager each day when you come in. Arrive by 8:00 a.m. each day. Be dressed for interviews. Bring a sack.), Who will do it? (Mrs. Alex), and Review Date (02/22/2002).

Once entries are complete in all fields, either hit the tab key or click your mouse somewhere in the main *Activity Plan* table. This brings up a *Save Changes* box. Clicking on *Yes* saves or creates the activity. Clicking on *No* deletes the activity. *Cancel* returns you to the *Add Activity* fields.

**IMPORTANT:** Saving the activity only saves it to the table. If you leave the Case Management System or pull up another FSSP for the same client without completing one of the save actions discussed on page 31, the entries will be deleted.

This screenshot is similar to the previous one, but the 'Save Changes' dialog box is open. It has a title bar 'Save Changes' and a message 'Save Changes?'. There are three buttons: 'Yes', 'No', and 'Cancel'. The background window is the same as the previous screenshot, showing the 'Case Management System' with the 'Work Activities' tab selected and the 'Add Activity' table.



Once the activity is saved, the first 64 characters of the *Activities* field display in the table. For any highlighted activity, the entire text for that activity appears in the box at the bottom of the screen. The text appears as it was entered, including any manual carriage returns.

The screenshot shows the 'Case Management System' window with the 'FSSP' tab selected. The client information is Alex Z1, Mon, born 07/29/1971, with SSN 048-34-8488. The 'Alaska Family Self-Sufficiency Plan History' section shows a plan starting 02/07/2002 with the title 'initial assessment/work search'. The 'Goals' section has two text areas: 'Short Term Goals' and 'Long Term Goals'. The 'Activity Plan' table has one row with the following data:

Start Date	Activities/hrs per week	Who will do it?	Review Date
02/07/2002	Attend Work Search at Home Job Service 20 hours per week.	See Mrs. Alex	02/22/2002

Below the table, a text box displays the full activity description: 'Attend Work Search at Home Job Service 20 hours per week. See case manager each day when you come in. Arrive by 8:00 a.m. each day. Be dressed for interviews. Bring a sack.'

To change (update) or delete an activity, right click on the activity you want to change, then select *Update* or *Delete* in the box that appears. Clicking *Update* returns the activity to the text fields where you can make your changes and re-save the activity. Clicking *Delete* brings up an edit box asking if you want to delete the record. Click *Yes* if you wish to delete the activity from the plan or *No* if you change your mind.

This screenshot shows the same 'Case Management System' window, but with a 'Delete Record' dialog box open over the 'Activity Plan' table. The dialog box has a title bar 'FSSP' and contains the text 'Delete Record' with 'Yes' and 'No' buttons. The 'Activity Plan' table and the text box below it remain visible in the background.

The *Services Needed* tab works very much like the *Activity Plan*. Right click anywhere in the table with your mouse, and then click on *Add*.

Enter the service information in the text fields that appear. Hit the *Tab* key or click on the *Services Needed* table to bring up the *Save Changes* box. Again, remember you may **save** the FSSP, or a portion of it, so it won't be deleted when you exit.

The *Services Needed* section can be updated or items deleted by the same method used for the *Activity Plan*.

The *Additional Information* tab is for entering other information the case manager or client thinks is important. This field allows up to 250 characters and will print up to three lines on the FSSP form if manual carriage returns are entered.

You will also find the *Signed Date* field on this tab with a drop-down calendar. Once a date is entered, the FSSP is protected and cannot be changed. Remember, if you pull up the calendar and realize you don't want to enter a date yet, just click on the Esc key on your keyboard. If a signed date is entered prematurely or the date is entered in error, the DPA EIS Help Desk can remove the date. Contact the Help Desk at [eishelp@health.state.ak.us](mailto:eishelp@health.state.ak.us)

Individual offices will need to establish procedures for the *Signed Date*. When information for the FSSP is received over the telephone and the printed form is mailed to the clients for their signature, we suggest leaving the *Signed Date* blank until the client signs the FSSP and returns the form to the case manager.

Spell and grammar check are activated when the FSSP is saved (see page 31). Once any field, for example, the short term goals field, is checked, if the FSSP is saved again, that field will not be checked again. However, if a change is made to the field by typing any input key, including the space bar or enter/carriage return, the field will be reopened for spell/grammar check. As with spell check in other parts of CMS, the FSSP screen will disappear, and spell check will appear in its place. Spell check may be a little slow. Please be patient and do not click your choice more than once or you may be exited from CMS. It helps to move the mouse slightly after each completed click.

The screenshot shows the 'Case Management System' window with the 'FSSP' tab selected. The form contains the following fields and sections:

- Client Information:** Client Number (0000029751), Client Name (Alex21, Mom), Client SSN (048-34-8488), Date of Birth (07/29/1971), and Phone Number ((000) 000-0000).
- Navigation Tabs:** Case Summary, Work Activities, Payment History, Case Notes, Client Notes, Alerts, and FSSP (selected).
- Alaska Family Self-Sufficiency Plan History:** Plan Start Date (02/07/2002), FSSP Title (initial assessment/work search), Est. Goal Date (02/28/2003), Review Date (02/22/2002), and Exempt Thru (blank).
- Goals:** Short Term Goals and Long Term Goals sections with text input fields. The Short Term Goals field contains: "This is a free-form field with word wrap and spell and grammar check. The field allows 250 characters and gives an edit when that maximum is reached. The field". The Long Term Goals field contains: "Typing in information to give this a completed look. This is where we would say that this client wants to end up with a full-time job as a Programmer/Analyst at".
- Bottom Navigation Tabs:** Steps Needed, Activity Plan, Services Needed, and Additional Information (selected).
- Additional Information:** A large text area with a description: "The additional information field is for any other information the client and case manager thinks is necessary. This field also allows 250 characters, and will, with manual returns, print up to 3 lines on the FSSP form."
- Signed Date:** A drop-down calendar field showing 02/07/2002.

To print the completed FSSP, click on the printer icon (next to the *STOP* sign) on the tool bar. That brings up a screen with *FSSP Appointment Time* information. The information entered here will print on the FSSP in the *This appointment will be: . . .* area. Click on **OK** once the information is entered. (If you choose *By Telephone*, then *Location of Interview* changes to *Telephone Number*.)

The next message box that appears is the printing information. Make sure you have selected the correct printer for your location. Choose the number of copies and then hit *Print*.

Another message box tells you the FSSP is printing. Small boxes may appear telling you page one or page two is printing.

The screenshot displays the 'Case Management System' window. At the top, there is a menu bar with 'Commands', 'FSSP', and 'Help'. Below the menu bar is a toolbar with icons for a stop sign, a printer, a traffic light, and a magnifying glass. The main form area contains several input fields: 'Client Number' (0000029751), 'Client Name' (Alex21, Mom), 'Client SSN' (048-34-8488), 'Date of Birth' (07/29/1971), and 'Phone Number' ((000) 000-0000). To the right of these fields is the 'STATE OF ALASKA' logo. Below the input fields are tabs for 'Case Summary', 'Work', 'Notes', 'Alerts', and 'FSSP'. The 'FSSP' tab is selected. Under the 'FSSP' tab, there are sections for 'Plan Start Date' (02/07/2002), 'Est. Goal Date' (02/28/2002), 'Goals', and 'Long Term Goals'. The 'Goals' section contains a text area with the text: 'This is a free- and spell and g allows 250 char when that maxim'. The 'Long Term Goals' section contains a text area with the text: 'mation to give this a This is where we would client wants to end up with as a Programmer/Analyst at'. At the bottom of the window, there are tabs for 'Steps Needed', 'Activity Plan', 'Services Needed', and 'Additional Information'. The 'Additional Information' tab is selected. It contains a text area with the text: 'The additional information field is for any other information the client and case manager thinks is necessary. This field also allows 250 characters, and will, with manual returns, print up to 3 lines on the FSSP form.' At the bottom right, there is a 'Signed Date' field with the value '02/07/2002'. A 'Printing' dialog box is overlaid on the main form, displaying the text 'PRINTING PLEASE WAIT'.

Case Management System

Commands FSSP Help

Client Number: 0000029751 Client Name: Alex21, Mom

Client SSN: 048-34-8488 Date of Birth: 07/29/1971 Phone Number: (000) 000-0000

State of Alaska

Case Summary Work Notes Alerts FSSP

Plan Start Date: 02/07/2002 Est. Goal Date: 02/28/2002

Goals

This is a free- and spell and g allows 250 char when that maxim

Long Term Goals

mation to give this a This is where we would client wants to end up with as a Programmer/Analyst at

Steps Needed Activity Plan Services Needed Additional Information

The additional information field is for any other information the client and case manager thinks is necessary. This field also allows 250 characters, and will, with manual returns, print up to 3 lines on the FSSP form.

Signed Date: 02/07/2002

PRINTING PLEASE WAIT



FSSPs are retained by CMS so you may view historical FSSPs. To access this history, click on *FSSP*. A window appears with several options:

The screenshot shows the 'Case Management System' window. The 'Commands' menu is open, displaying options: 'Get an FSSP', 'Update FSSP', 'Create Blank FSSP', 'Delete', 'Spelling Check', and 'Grammar Check'. The 'Get an FSSP' option is highlighted. Below the menu, the 'Client Name' is 'Andrew, Mousen' and the 'Client SSN' is '000 000 0000'. The 'FSSP' tab is selected, showing the 'Alaska Family Self-Sufficiency Plan History' section. The 'Plan Start Date' is '01/24/2002' and the 'FSSP Title' is 'oops I didn't save any of this, how long is this!'. The 'Est. Goal Date' is '01/31/2003' and the 'Review Date' is '02/01/2002'. The 'Goals' section is divided into 'Short Term Goals' and 'Long Term Goals'. The 'Steps Needed' section is divided into 'Work Activities', 'Education/Training', and 'Other Activities'. The 'Work Activities' section has a list of checkboxes: 'Employment - Full time', 'Employment - Part time', 'Job Search' (checked), 'Volunteer/Work Experience', 'Job Sampling', 'On-the-job training', and 'Job Readiness'. The 'Education/Training' section has a list of checkboxes: 'High School diploma', 'GED', 'ESL', 'Literacy improvement', 'Job skill training', and 'Employment counseling' (checked). The 'Other Activities' section has a list of checkboxes: 'Life Skills instruction', 'Parenting skills workshop', 'Establish paternity' (checked), 'Help CSEd locate absent parent', 'Get a child support order in place', and 'Substance abuse assessment/treatment'.

Select *Get an FSSP*. A list of FSSPs will appear in chronological order with the most current plan listed first. Double click on the one you want to review to bring it up (or highlight your selection and click on the *Traffic Light*). If the selected FSSP does not have a signed date, you may enter changes.

The screenshot shows the 'Case Management System' window with the 'Family Self-Sufficiency Plan - Search' window open. The 'Client Number' is '00' and the 'Client SSN' is '49'. The 'Case Summary' section shows the 'Client Number' as '000029429' and the 'Client Name' as 'Andrew, Mousen'. The 'FSSP' tab is selected, showing a table of FSSPs. The table has columns for 'Start Date', 'Review Date', and 'FSSP Title'. The first row is highlighted in blue. The 'Start Date' is '01/24/2002' and the 'Review Date' is '01/25/2002'. The 'FSSP Title' is 'oops I didn't save any of this, how long is this!'. The 'Plan Start Date' is '01/24/2002' and the 'Est. Goal Date' is '01/31/2003'. The 'Goals' section is divided into 'Short Term Goals' and 'Long Term Goals'. The 'Steps Needed' section is divided into 'Work Activities', 'Education/Training', and 'Other Activities'. The 'Work Activities' section has a list of checkboxes: 'Employment - Full time', 'Employment - Part time', 'Job Search' (checked), 'Volunteer/Work Experience', 'Job Sampling', 'On-the-job training', and 'Job Readiness'. The 'Education/Training' section has a list of checkboxes: 'High School diploma', 'GED', 'ESL', 'Literacy improvement', 'Job skill training', and 'Employment counseling' (checked). The 'Other Activities' section has a list of checkboxes: 'Life Skills instruction', 'Parenting skills workshop', 'Establish paternity' (checked), 'Help CSEd locate absent parent', 'Get a child support order in place', and 'Substance abuse assessment/treatment'.



There is a *Delete* option in the FSSP drop-down menu. Any FSSP without a signed date may be deleted. Select the plan you wish to delete by the steps detailed above: *Get an FSSP*. Then click on *FSSP* to see the drop down menu again, and click on *Delete*.

The screenshot shows the 'Case Management System' window. The 'Commands' menu is open, and the 'Delete' option is highlighted. The form displays client information: Client Name: Andrews, Maureen; Date of Birth: 11/01/1971; Phone Number: (000) 000-0000. The 'FSSP' tab is selected, showing the 'Alaska Family Self-Sufficiency Plan History'. The 'Plan Start Date' is 01/10/2002, and the 'Est. Goal Date' is 01/10/2003. The 'FSSP Title' field is empty. The 'Goals' section has two text areas: 'Short Term Goals' and 'Long Term Goals'. The 'Additional Information' field is also present. The 'Signed Date' field is at the bottom right.

An edit box appears asking if you want to delete the FSSP.

The screenshot shows the 'Case Management System' window with the 'FSSP' tab selected. A dialog box titled 'Delete FSSP?' is displayed in the center, asking for confirmation to delete the plan. The dialog has 'Yes' and 'No' buttons. The background form shows the same client information and FSSP details as the previous screenshot.

If you click *Yes*, the plan is deleted.

The screenshot displays the 'Case Management System' window. At the top, there are menu options: 'Commands', 'FSSP', and 'Help'. Below the menu is a toolbar with icons for 'Stop', 'Print', 'New', 'Find', and 'Help'. The main form area contains client information: 'Client Number: 0000029427', 'Client Name: Andrews, Maureen', 'Client SSN: 482-30-4888', 'Date of Birth: 11/01/1971', and 'Phone Number: (000) 000-0000'. A 'State of Alaska' logo is visible on the right. Below this is a tabbed interface with 'Case Summary', 'Work Activities', 'Payment History', 'Case Notes', 'Client Notes', 'Alerts', and 'FSSP'. The 'FSSP' tab is active, showing 'Alaska Family Self-Sufficiency Plan History'. It includes fields for 'Plan Start Date: 01/10/2002', 'FSSP Title:', 'Est. Goal Date: 01/10/2003', 'Review Date: 01/25/2002', and 'Exempt Thru:'. Below these are 'Goals' sections for 'Short Term Goals' and 'Long Term Goals'. A dialog box titled 'FSSP' is open, displaying 'Record Deleted' and an 'OK' button. The 'Short Term Goals' text area contains a message about the 250-character limit and 5-line printing constraint. The 'Long Term Goals' text area contains a message about the 250-character limit and spell/grammar check. At the bottom of the main form are tabs for 'Steps Needed', 'Activity Plan', 'Services Needed', and 'Additional Information'. The 'Additional Information' tab is active, showing a text area with instructions: 'The Additional Information field is for any other information the case manager or client thinks is needed. It, like the short and long term goals fields, allows 250 characters of entry. Spell and grammar check is accessed by clicking on "ABC-check"'. A 'Signed Date:' field is at the bottom right.

Case Management System

Commands FSSP Help

Client Number: 0000029427 Client Name: Andrews, Maureen

Client SSN: 482-30-4888 Date of Birth: 11/01/1971 Phone Number: (000) 000-0000

Case Summary Work Activities Payment History Case Notes Client Notes Alerts FSSP

Alaska Family Self-Sufficiency Plan History

Plan Start Date: 01/10/2002 FSSP Title:

Est. Goal Date: 01/10/2003 Review Date: 01/25/2002 Exempt Thru:

Goals

Short Term Goals

This is a free-form field of 250 characters. You may type in 6 1/2 or 7 lines, but when it prints to the FSSP it will only print 5 lines. You cannot

Long Term Goals

Long term goals box works the same way as short term. Both boxes, as well as text portions of the FSSP, have word spell check. For most fields,

FSSP

Record Deleted

OK

Steps Needed Activity Plan Services Needed Additional Information

The Additional Information field is for any other information the case manager or client thinks is needed. It, like the short and long term goals fields, allows 250 characters of entry. Spell and grammar check is accessed by clicking on "ABC-check"

Signed Date:

## Ending a CMS Session

To end a CMS session, simply click once on the *Stop Sign* on the tool bar or click once on the *X* located at the top right corner of the window. You may also use the menu bar by selecting *Commands* and then *Exit*.

The screenshot shows the Case Management System (CMS) window. The title bar reads "Case Management System". The menu bar includes "Commands", "Client Alerts", and "Help". The toolbar contains icons for various functions, including a stop sign. The main area displays client information: Client Number (000029427), Client Name (Anderson, Maureen), Client SSN (482-30-4688), Date of Birth (11/01/1971), and Phone Number (000)000-0000. Below this, there are tabs for "Case Summary", "Work Activities", "Payment History", "Case Notes", "Client Notes", "Alerts", and "FSSP". The "Alerts" tab is selected, showing a table of client alerts. The table has four columns: "Due Date", "Alert Message", "Created Date", and "Who Created Alert". The first row shows a due date of 01/20/2002, an alert message of "Testing (011-4401 & 254-3-31 End of Alerts)", a created date of 01/20/2002, and who created the alert as BEORTEST RORA. The total alerts found is 00/001.

Due Date	Alert Message	Created Date	Who Created Alert
01/20/2002	Testing (011-4401 & 254-3-31 End of Alerts	01/20/2002	BEORTEST RORA

Total Alerts found: 00/001

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## **GLOSSARY**

ATAP: Alaska Temporary Assistance Program. The name for the State of Alaska's cash assistance program for families with children. May also be abbreviated as "TA."

Auto Thru: setting a date (month and year) to allow a case or an activity to be moved forward automatically from month to month by the eligibility or case management systems.

Client Number: a 10-digit identifying number assigned to each client or person that is registered in the Eligibility Information System. These client numbers start with "06."

Client SSN: the Social Security Number of a client registered in the Eligibility Information System.

CMS: Case Management System. The computer system used to enter information about work services clients.

DPA: Division of Public Assistance—the unit of the Department of Health and Social Services of the State of Alaska that administers welfare programs.

EIS: Eligibility Information System. The computer system used by Division of Public Assistance to determine eligibility for the various welfare programs and to issue benefits, notices, etc.

H&SS: Department of Health and Social Services. A department of the government of the State of Alaska.

FSSP: Family Self-Sufficiency Plan. The written plan clients and case managers complete together to help guide the family to being self-sufficient. Plans are frequently reviewed and updated or changed to be current with the family's progress and needs.

IC: Incapacitated. Describes a Temporary Assistance household in which at least one parent is unable to work due to some sort of incapacitation.

JAS: Jobs Automated System. The computer system used to enter work services information for Temporary Assistance and Food Stamp recipients. Now integrated with the Eligibility Information System.

JASP: "JAS" Payments system. The computer system used for issuing supportive services and child care monies for clients participating in work activities. Now integrated with the Eligibility Information System.

REG: Regular. Describes a Food Stamp household type to which no special considerations or policies apply.



SPE: Special Category. Describes a Food Stamp household containing at least one member who is elderly (age 60 or older) or disabled.

Supportive Services: Payments made on behalf of work services clients to vendors who provide services that allow the client to work, such as child-care, transportation costs, etc.

Sys Ops: Systems Operations. The computer systems programming and testing unit of Division of Public Assistance. The Eligibility Information System Help Desk is also part of this unit.

TA: See “ATAP.”

TANF: Temporary Assistance for Needy Families. The name of the federal program that provides block grants to the states to use to run their individual programs for providing cash assistance to families with children. Alaska’s program is called ATAP or the Alaska Temporary Assistance Program.

User ID: the series of numbers and/or letters assigned to each worker as part of their security access to the various areas of the State of Alaska Computer Network.

1P: “one parent.” Describes a Temporary Assistance household where there is only one parent in the home.

2P: “two parent.” Describes a Temporary Assistance household where both the mother and the father are in the home.